



## Job Aid:

### How to Create a WTO Intent to Post

#### This Job Aid shows how to:

Create a World Trade Organization (WTO) Notice of Intent to Post from an approved Requisition in COMMBUYS.

#### Of Special Note:

In compliance with the World Trade Organization (WTO)'s [Agreement on Government Procurement \(AGP\)](#), Departments seeking goods and services including human and social services valued at more than \$558,000 or construction valued at more than \$7,864,000 must post either:

- a) **Full Bid documents and materials** for at least 40 days prior to the Bid Opening Date [in which case, please use a different job aid titled [Create Bid with Requisition in COMMBUYS](#) or [How to Create a Bid From Scratch](#)], **or**
- b) **An Intent to Post notice with a later Amendment to add the full Bid documents and materials** for a combined period of at least 40 days prior to the Bid Opening Date. This is a two-step process:
  - As the first step (items 1-28 below), the Departments must create a Bid record with the full Bid title in the Description field and attach the Intent to Post notice as provided in Appendix 1 (see page 19 of this document). The title of such a Bid record should not include the words “announcement only,” because this field cannot be amended after Bid publication.
  - As the second step of the process (items 29-41 below), Departments must amend the COMMBUYS Bid record and add the full Bid documents to it. A separate COMMBUYS Bid record with the full Bid documents may not be created.

These WTO threshold levels change every two years and will be updated again in January 2016.



OPERATIONAL SERVICES DIVISION

## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot



COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers.

**COMMBUYS INFORMATION:** For more information on COMMBUYS please visit us at [COMMBUYS](http://www.commbuys.com). If you have any questions or concerns contact the COMMBUYS Help Desk at [COMMBUYS@state.ma.us](mailto:COMMBUYS@state.ma.us) or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-827-8283 or 617-720-3197.

- [Register](#)  
Register here to begin using COMMBUYS.  
Vendors, please read this [disclaimer](#) prior to registering.
- [Complete Registration](#)  
Complete registration here to begin using COMMBUYS.  
Vendors, please read this [disclaimer](#) prior to completing registration.
- [Open Bids](#)  
Browse open bid opportunities.
- [Active Contracts](#)  
Browse active Contracts/Blankets.
- [Contract & Bid Search](#)  
Search for Bids and active Contracts/Blankets.
- [Registered Vendor Search](#)  
Search for registered vendors.

Login ID:

Password:

#### Directions

##### Step 1: Log into COMMBUYS

1. Launch the COMMBUYS Web site by entering the URL ([www.commbuys.com](http://www.commbuys.com)) into your Browser.
2. Enter your login credentials and click the **Login** button on the COMMBUYS home page.



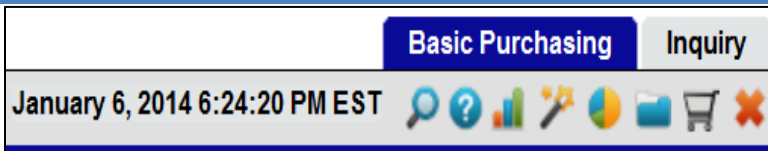
OPERATIONAL SERVICES DIVISION

## Job Aid:

### How to Create a WTO Intent to Post

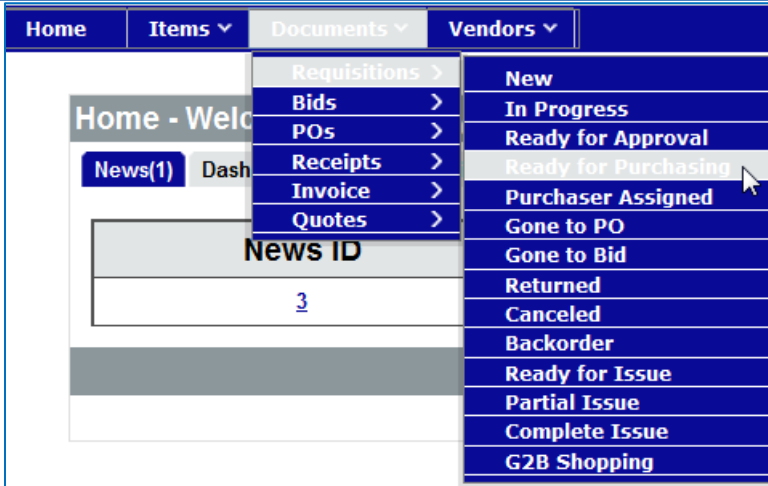
#### Screenshot

#### Directions



#### Step 2: Basic Purchasing Role

Upon successful login, if you have multiple roles in COMMBUYS, select the **Basic Purchasing** role tab on the upper right side of the page.



#### Step 3: Select the Document

Use the blue Navigation Bar to select **Documents > Requisitions > Ready for Purchasing** for Purchasing.

Requisitions - Ready for Purchasing	
Requisition #	Requisition Date
<a href="#">1400329</a>	01/13/2014
<a href="#">1400307</a>	01/09/2014
<a href="#">1400306</a>	01/09/2014
<a href="#">1400302</a>	01/09/2014
<a href="#">1400289</a>	01/07/2014
<a href="#">1400275</a>	12/26/2013
<a href="#">1400188</a>	12/18/2013
<a href="#">1400185</a>	12/18/2013
<a href="#">1400170</a>	12/17/2013
<a href="#">1300112</a>	09/24/2013
<a href="#">1300110</a>	09/24/2013
<a href="#">1300074</a>	08/06/2013

#### Step 4: Open the Requisition

COMMBUYS displays a list of requisitions meeting the criteria display. Click the desired blue hyperlink in the **Requisition #** column to open the requisition that you would like to convert to a Bid.



OPERATIONAL SERVICES DIVISION

## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 5: Convert the Req to a Bid

The Requisition opens to the Summary tab. Scroll to the bottom of the page and click the **Convert to Bid** button.

Open Market Requisition 1400289

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

**Header Information**

**Requisition Number:** 1400289 **Short Description:**

**Organization:** Operational Services Division **Location:**

**Department:** BSAS - Bureau of Substance Abuse Services **Requisition Type:**

**Entered Date:** 01/07/2014 **Purchaser:**

**Requestor:** Leslie Doughty **Contact Phone:**

**Contact:** Leslie Doughty **Print Format:**

**Estimated Cost:** \$750,050.00

**Solicitation Enabled:** No

**Invoice Method:** Three Way Match

**P-Card Desired:** No

**Ship-to Address:** Operational Services Division  
Address  
Boston, MA 02108  
US  
Email: ejacobsen@periscopeholdings.com  
Phone: (555)555-5555

**Bill-to Address:**

**Vendors:**

Vendor ID	Alternative ID	Vendor Name	Preferred Del
00000081		Isle of Skye, LTD	Email

Status: 1RRP - Ready for Purchasing

Snow Man Party **Status:** 1RRP - Ready for Purchasing

2300 - Central SA **Required By Date:** 01/10/2014

Open Market **Type Code:**

Alyssa Arnold **Fiscal Year:** 2014

(555)555-5555 **Alternate ID:**

Operational Services Division  
Address  
Boston, MA 02108  
US  
Email: ejacobsen@periscopeholdings.com  
Phone: (555)555-5555

Very Method	Recommended
	Yes

Convert to Bid Convert to PO Cancel Requisition Clone Requisition Print

##### Step 6: Confirm

Click the **OK** button to confirm.

Message from webpage

Are you sure you want to convert this requisition to a bid?

OK Cancel



OPERATIONAL SERVICES DIVISION

## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

Open Market Bid 00000144

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Remi

**General Validation Errors**

- The following required fields are missing: bid opening date, available date.

Bid Number: 00000144

Status: 2BI - In Progress

How Solicited: Email

Department: BSAS - Bureau of Substance Abuse Services

Location: 2300 - Central SA

Show on Web: ☒

Required Date: 01/14/2014

Available Date: (MM/DD/YYYY HH:MM:SS AM or PM)

Bid Type: Open Bid

Control Code:

Print Dest Detail: Always

Purchase Method: Open Market

Tax Rate:

Item Single Award Only: ☐

Status: 2BI - In Progress

Summary

Description:

Purchaser: Buyer, Buyer

Type Code:

Fiscal Year: 2014

Organization: Operational Services Division

Allow Electronic Response: ☒

Bid Opening Date: (MM/DD/YYYY HH:MM:SS AM or PM)

Purge Date: (MM/DD/YYYY)

Informal Bid: ☐

Estimated Cost: \$750,050.00

Alternate ID:

Print Format: Bid Print

Solicitation Enabled: No

Bulletin Desc: (Max size: 500 characters)

#### Step 7: Required Bid Screen Fields

The Bid screen opens to the General tab where any necessary updates can be made.

Fields that require completion include:

- Available Date** – Enter the date the Bid (solicitation) is made available to vendors to submit quotes. Click the calendar icon to set the desired month, day, and time.
- Description** – By default this field will include the information entered in the Short Description of the associated requisition. Revise this field to include the full Bid title and, if applicable, the internal departmental document number (e.g. FAC76). **Note: Do not add “announcement only” to the Bid title, because Bid Description cannot be amended after Bid publication.**
- Bid Opening Date** – date the Bid will close and quotes can be opened for viewing. Click the calendar icon to set the desired month, day, and time. This date must be at least 40 days after the Bid Available date.
- Bulletin Description** – Place the information about the product or service being sought in the bid into this field. **Note: Do not add “announcement only” or other announcement-related information into this field, because Bulletin Description cannot be amended after Bid publication.**

Type Code:

#### Step 8: Type Code

At the **Type Code** dropdown select one of the following:

- SS ( Bid for a statewide contract)
- NS ( Bid for a non-statewide, departmental contract)



OPERATIONAL SERVICES DIVISION

## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 9: Items Tab

1. Click the **Items** tab.
2. The Items tab for the Bid opens.  
Review the items to ensure all items were imported from the Requisition.

**Note: Items may be amended once the full Bid materials are published.**

Open Market Bid 00000144

General **Items** Address Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

Sort by Column: Print Sequence ☐ Sort Descending

Item #	Links	Print Sequence	Quantity	UOM	Unit Cost
1	Req # / Item #: 1400289 / 1	1.0	Electron Microscope		
			5.0	EA	150000.00
2	Req # / Item #: 1400289 / 2	2.0	brilliant white copy paper		
			10.0	CS	5.00

Status: 2BI - In Progress

Summary

Item Description				Total Cost	Delete
Net Unit Cost	Total Discount Amt.	Tax Rate	Tax Amount		<input type="checkbox"/>
\$150000.00	\$0.00	0.0	\$0.00	\$750000.00	<input type="checkbox"/>
\$5.00	\$0.00	0.0	\$0.00	\$50.00	<input type="checkbox"/>
Total				\$750050.00	

##### Step 10: Address Tab

Click the **Address** tab and verify the Ship-to and Bill-to addresses.

Open Market Bid 00000144

General Items **Address** Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

Ship-to Address

002 - Accounts Payable for Eric's Department

Operational Services Division  
Address  
Boston, MA 02108  
US  
Email: ejacobsen@periscopeholdings.com  
Phone: (555)555-5555

Status: 2BI - In Progress

Bidders Summary

Bill-to Address

002 - Accounts Payable for Eric's Department

Operational Services Division  
Address  
Boston, MA 02108  
US  
Email: ejacobsen@periscopeholdings.com  
Phone: (555)555-5555

## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 11: Attachments Tab

1. Click the **Attachments** tab.
2. To add a file, click the **Add File** button.

##### Step 12: Adding Files

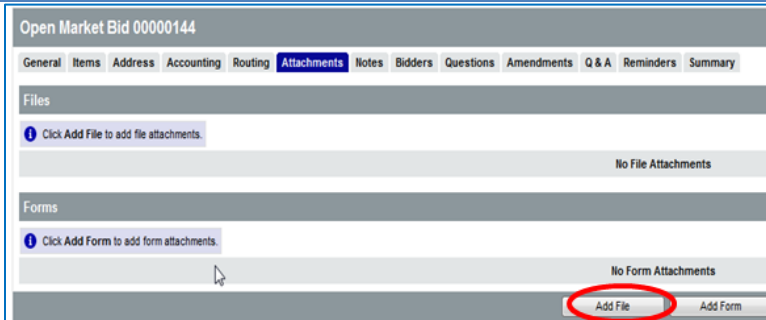
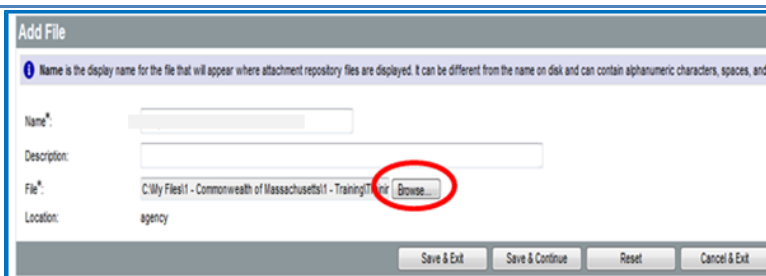
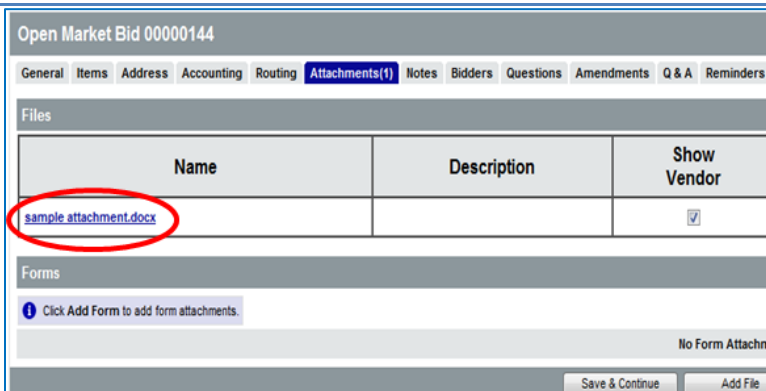
Fields on the Add File screen:

- **Name** – required; enter “**Intent to Post**”
- **Description** – optional

1. Click the **Browse** button to select a file.
2. You must select the **Intent to Post** file that includes the verbiage in Appendix 1 that is displayed at the end of this job aid.
3. To add any additional files, click the **Save & Continue** button.
4. Repeat as necessary until all required documents are added.
5. After file upload is complete, click the **Save & Exit** button.

##### Step 13: Attachments List

The Attachments page displays the attached file name after a file upload completes.

Name	Description	Show Vendor
sample attachment.docx		<input checked="" type="checkbox"/>



## Job Aid:

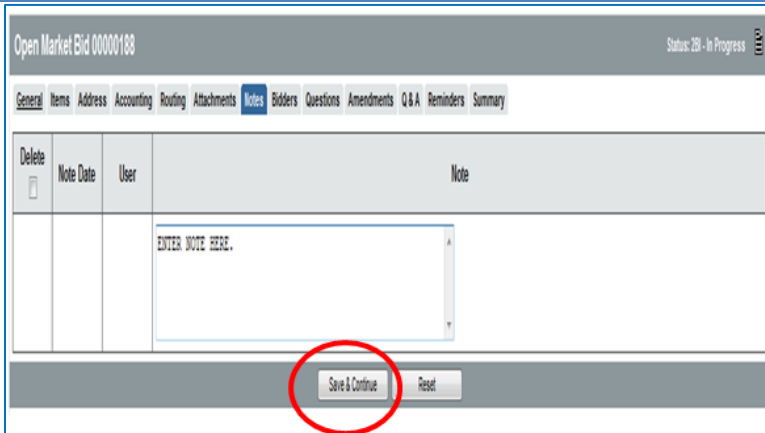
### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 14: Notes Tab

1. Click the **Notes** tab.
2. Enter any desired notes pertaining to the Bid.
3. Click the **Save & Continue** button when done.



Open Market Bid 00000188 Status: 288 - In Progress

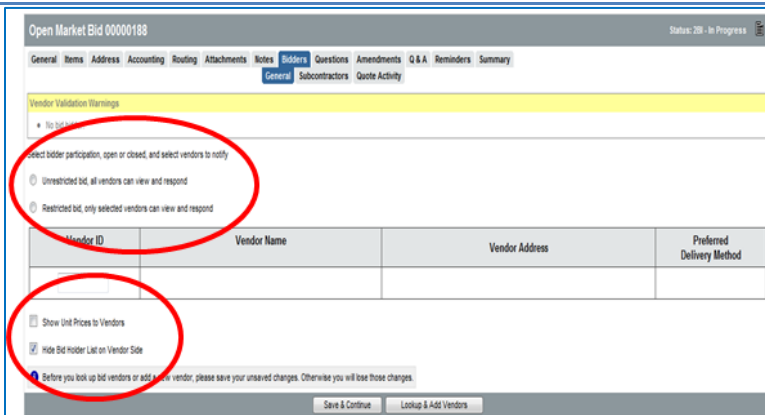
General Items Address Accounting Routing Attachments **Notes** Bidders Questions Amendments Q & A Reminders Summary

Delete	Note Date	User	Note
			ENTER NOTE HERE.

Save & Continue Reset

##### Step 15: Bidders Tab

1. Click the **Bidders** tab.
2. Bids that fall under the WTO requirement are **Open Bids**.
3. Choose **Unrestricted**
4. If you want vendors to see your price, select the **Show Unit Prices to Vendors** checkbox, and deselect the **Hide Bid Holder List on Vendor Side** checkbox.



Open Market Bid 00000188 Status: 288 - In Progress

General Items Address Accounting Routing Attachments **Bidders** Questions Amendments Q & A Reminders Summary

Vendor Validation Warnings

Select bidder participation, open or closed, and select vendors to notify

☐ Unrestricted bid, all vendors can view and respond

☐ Restricted bid, only selected vendors can view and respond

Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method

☐ Show Unit Prices to Vendors

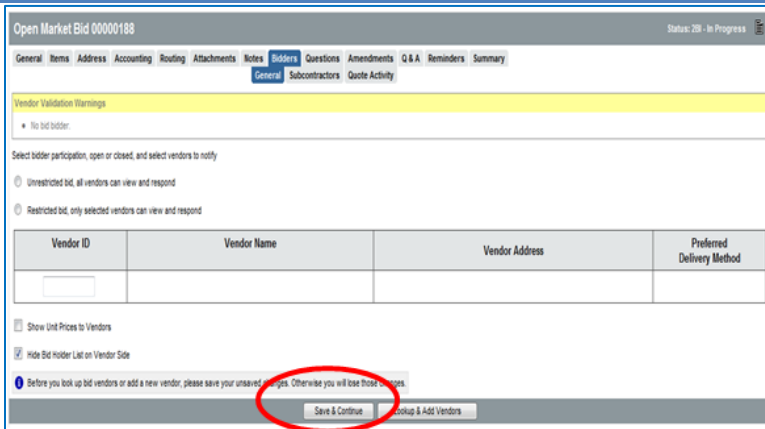
☒ Hide Bid Holder List on Vendor Side

Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

Save & Continue Lookup & Add Vendors

##### Step 16: Adding Vendors

To add Vendors to be notified of the Bid via email, click the **Lookup & Add Vendors** button.



Open Market Bid 00000188 Status: 288 - In Progress

General Items Address Accounting Routing Attachments **Bidders** Questions Amendments Q & A Reminders Summary

Vendor Validation Warnings

Select bidder participation, open or closed, and select vendors to notify

☐ Unrestricted bid, all vendors can view and respond

☐ Restricted bid, only selected vendors can view and respond

Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method

☐ Show Unit Prices to Vendors

☒ Hide Bid Holder List on Vendor Side

Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

Save & Continue Lookup & Add Vendors



## Job Aid:

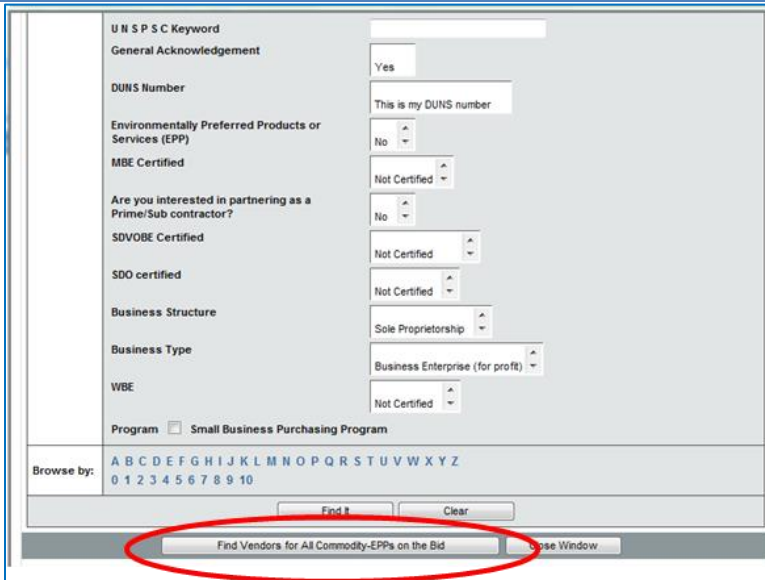
### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 17: Finding Vendors

1. Scroll to the bottom of the Lookup & Add Vendors screen.
2. Click the **Find Vendors for All Commodity-EPPs on the Bid** button.



UNSPSC Keyword:

General Acknowledgement:

DUNS Number:

Environmentally Preferred Products or Services (EPP):

MBE Certified:

Are you interested in partnering as a Prime/Sub contractor?:

SDVOBE Certified:

SDO certified:

Business Structure:

Business Type:

VBE:

Program ☐ Small Business Purchasing Program

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z  
0 1 2 3 4 5 6 7 8 9 10

Find # Clear

**Find Vendors for All Commodity-EPPs on the Bid** Close Window

##### Step 18: Selecting Vendors

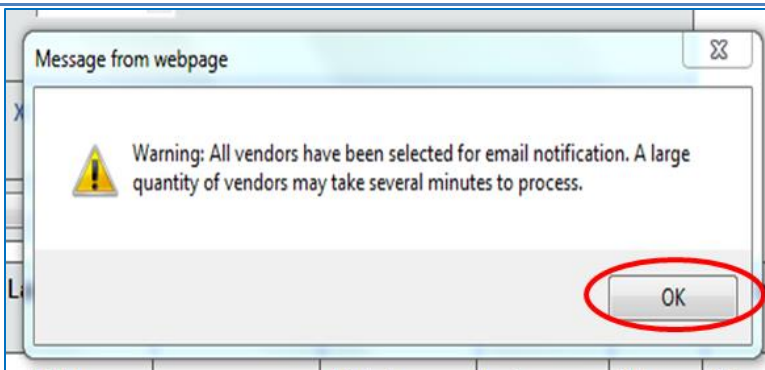
1. To select vendors, click the checkbox in the **Select** column of the desired vendor row.
2. Use the checkbox at the top of the **Select** column to select all displayed vendors who should receive email notification.

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
<input type="checkbox"/>	00000000	Bare Supply		Mar 9, 2014		1 Main st	boston	MA	William Bare	(800) 000-0000	No
<input type="checkbox"/>	00000001	Kramerica Industries		Jun 13, 2014		1 Main Street	Somerville	MA	Coono Kramer	(800) 000-0000	No
<input type="checkbox"/>	00000002	Newspro		Mar 4, 2014		1 Main st	boston	MA	Zev dayaki	(800) 000-0000	No
<input type="checkbox"/>	00000003	Third Test				1 Main St	Boston	MA	James Tester	(800) 000-0000	No
<input type="checkbox"/>	00000004	XYZ Inc				1 Main Street	Cambridge	MA	Paul Compton	(800) 000-0000	No

Save & Exit Save & Continue Find Vendors for All Commodity-EPPs on the Bid Close Window

##### Step 19: Popup Box

1. If you have selected the checkbox at the top of the **Select** column, a popup message notifies that all vendors have been selected.
2. Click the **OK** button.
3. Click the **Save & Exit** button to save your selections.



## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 20: Additional Vendors

- Repeat step 16 to add additional vendors.
- The Lookup & Add Vendors screen allows you to search for vendors by vendor characteristics such as vendor name and ID or by entering all relevant commodity codes to the notification list then clicking the **Find It** button.
- Repeat Step 18 (mark check boxes) to select additional vendors.

##### Step 21: Questions Tab

If desired, click the **Questions** tab.

**Note: It is recommended that Questions be populated as an attachment at the time of publication of the full Bid materials.**

Note: The **Amendments** tab has no functionality until after the Bid is posted. It is used only after Bid is final and complete and the actual Bid solicitation is attached.

Lookup & Add Reference Vendors - Bid 00000202

Search Using: ALL of the criteria ▼

Find It Clear

Search Fields:

Vendor ID		Vendor Name	
Vendor Tax ID		Show <input type="checkbox"/> Vendor Legal Name	
Vendor Keyword		Alternate ID	
ZIP Code		County	
State	▼		
<input type="checkbox"/> Emergency Suppliers		<input type="checkbox"/> Reference Vendor	
U N S P S C Segment-Family	▼		
U N S P S C Class	▼		
U N S P S C Keyword			
General Acknowledgement	Yes		
DUNS Number	This is my DUNS number		
Environmentally Preferred Products or Services (EPP)	No ▼		
MBE Certified	Not Certified ▼		
Are you interested in partnering as a Prime/Sub contractor?	No ▼		
SDVOBE Certified	Not Certified ▼		
SDO certified	Not Certified ▼		
Business Structure	Self-Proposable		

Blanket Bid 00000185 Status: 25% In Progress (1/10)

General Items Address Accounting Routing Attachments Notes Bidders **Questions** Amendments Q & A Reminders Summary

Delete	Question #	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	0	10	<input type="checkbox"/>		AVAILABLE ▼

☐ Delete All

Save & Continue Reset

Copyright © 2014 Professional Builders, Inc. All Rights Reserved

## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 22: Q&A Tab

1. Click the **Q&A** tab. If a dialogue with the vendor is desired, select the **Allow vendor to submit questions** checkbox.

**Recommendation: Don't enable the Q&A functionality until after the publication of the full Bid materials.**

2. If you would like COMMBUYS to notify you when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.
3. If desired, you and/or the vendor can enter a **Question Subject** and **Question** into the respective fields, and the other party can respond in the **Answer** field.
4. If you wish to display the dialogue on the Web, select the **Show on Web** checkbox. The **Show Original Vendor Only** checkbox is available if appropriate.

##### Step 23: Reminders Tab

1. If desired, click the **Reminders** tab to send a reminder to yourself or another person internal to your organization.
2. Use the calendar icon in the **Due Date** field to select the date of the reminder then enter your reminder text in the **Comment** field.
3. Select yourself or another internal recipient in the drop-down menu next to the **Remind Whom** field.
4. If you would like to send a "tickler" or pre-notification in advance of the reminder, enter the number of days of the pre-notification in the **Days Prior to Reminder** field.
5. If you would like the reminder send via email, select the **Send Email** checkbox.
6. When complete, click the **Save & Continue** button.

Blanket Bid 00000185 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments **Q&A** Reminders Summary

Question #	Created Date	User Created	Question Subject	Question	Answer	Show on Web	Show Original Vendor Only	Delete
Add New:								

☐ Allow vendor to submit questions

☐ Send notification when vendor submitting question

Save & Continue Reset

Blanket Bid 00000185 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q&A **Reminders** Summary

Due Date* (MM/DD/YYYY)	Comment* (max 250 characters)	Remind Whom*	Days Prior to Remind*	Date Completed (MM/DD/YYYY)	Send Email	Date Entered	Entered By
			0				

Save & Continue Reset

## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 24: Summary Tab

Click the **Summary** tab to review the Bid information.

Open Market Bid 0000144 Status: 2B - In Progress

General Items Address Accounting Routing Attachments() Notes Bidders Questions Amendments Q & A Reminders **Summary**

**Header Information**

Bid Number:	0000144	Description:	Snow Man Party	Status:	2B - In Progress
Purchaser:	Buyer Buyer	Minor Status:		How Solicited:	Email
Organization:	Operational Services Division				
Fiscal Year:	14	Department:	BSAS - Bureau of Substance Abuse Services	Location:	2300 - Central SA
Show On Web:	Yes	Allow Electronic Quote:	Yes	Required Date:	01/16/2014
Bid Opening Date:	01/15/2014 12:20:00 PM	Available Date:	01/14/2014 12:20:00 PM		
Purge Date:					
Bid Type:	Open Bid	Informal Bid:	No		
Control Code:		Estimated Cost:	\$750,050.00	Print Dest Detail:	
Alternate ID:		Purchase Method:	Open Market	Catalog Id (for contract):	
Blanket/Contract Begin Date:		Blanket/Contract End Date:		Type Code:	
Info Contact:	Contact Leslie Doughty at (555)555-5555	Bulletin Desc:		Pre-Bid Conference:	
U N S P S C Code Certified Required:	No	Acknowledge inclusion required:	No	Hour of Acknowledge inclusion:	0.0
Subcontractor Info:		Quote Notification:	No		
Date Last Updated:	01/14/2014 12:28:19 PM	User last Updated:	Buyer Buyer	Item Single Award Only:	No
Ship-to Address:	Operational Services Division Address Boston, MA 02108 US Email: ejacobson@operationalholdings.com Phone: (555)555-5555	Bill-to Address:	Operational Services Division Address Boston, MA 02108 US Email: ejacobson@operationalholdings.com Phone: (555)555-5555	Print Format:	Bid Print
Solicitation Enabled:	No				
Invoice Method:	Three Way Match				
Bidders:					

Vendor Id	Vendor Name	Preferred Delivery Method	Notifications	Responded
00000001	Id of State, LTD	Email		No

##### Step 25: Submit for Approval

Scroll to the bottom of the page and click the **Submit for Approval** button.

**Submit for Approval** Cancel Bid Clone Bid Print

##### Step 26: Send the Bid

Once the Bid has been approved, return to the Summary tab of the Bid, scroll to the bottom of the page and click the **Send Bid** button.

Summary Status: 2BR - Ready to Send

Snow Man Party Status: 2BR - Ready to Send

BSAS - Bureau of Substance Abuse Services How Solicited: Email

Yes Location: 2300 - Central SA

01/14/2014 12:20:00 PM Required Date: 01/16/2014

No Print Dest Detail:

\$750,050.00 Catalog Id (for contract):

Open Market Type Code:

No Pre-Bid Conference:

Hour of Acknowledge inclusion: 0.0

**Send Bid Actions**

Option(s) ☒ Change bid status to "Sent" and notify vendors ☐ Change bid status to "Sent" only.

**Send Bid** Cancel Bid Clone Bid Print

## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 27: Complete

Click the **OK** button to complete the process. This will notify any vendor listed on the Bid as well as post the Bid on COMMBUYS for all vendors to search and quote.

##### Step 28: Sent Status

The Bid status updates to 'Sent' and will appear in COMMBUYS based on the available date and bid opening dates.

##### Step 29: Access Sent Bid

After posting the announcement, once the full Bid information (e.g. the Request for Response document, final wording of the Bid Items, questions for the Questions tab, etc.) is finalized and complete, select **Documents > Bids > Sent** from the Navigation Bar.

##### Step 30: Access a Sent Bid

Click the blue hyperlink for the desired **Bid #**.

Vendor Notification Result

Subject: Bid Notification - Bid # 00000144 Show Item Entry

Email Recipients

Delivery Date: 01/14/2014 02:14:10 PM

Vendor ID	Vendor Name	Email Address
00000144	State of Ohio, LTD	Stylor Stylor (info.hankins-grant@accure.com)

OK

Status: 2BS - Sent

Home Items Documents Vendors

Requisitions > Bids > POs > Receipts > Invoice > Quotes >

New Ready To Open In Progress Ready for Approval Ready to Send Sent Opened Returned Evaluated Approved Bid to PO Canceled

Bids - Sent

Bid(1)

Bid #	Organization	Buyer	Description	Purchase Method	Bid Opening Date	Open Quotes	Quote History	Bid Holder
00000144	Organization 1X1Z	Paul Martin	Substance Abuse Services	Open Market	08/15/2014 10:31:00 AM			<a href="#">List</a>

View All Exit

## Job Aid:

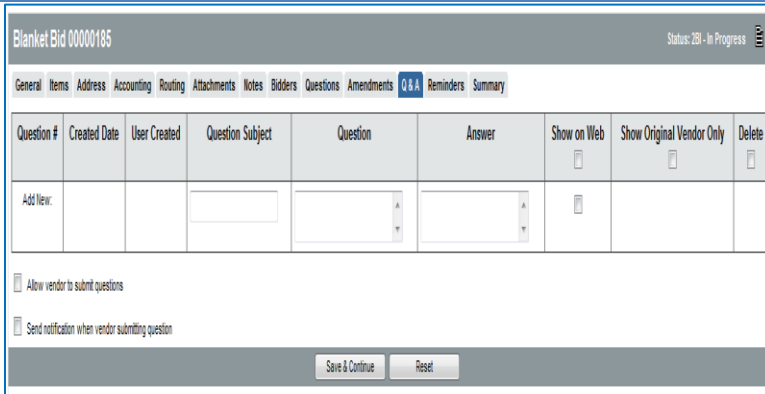
### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 31: Q&A Tab

If the **Q&A** functionality was not previously activated (as in Step 22), it can be activated at this time.



##### Step 32: Creating a Bid Amendment

1. Click on the **Amendments** tab.
2. Click the **Create Bid Amendment** button.



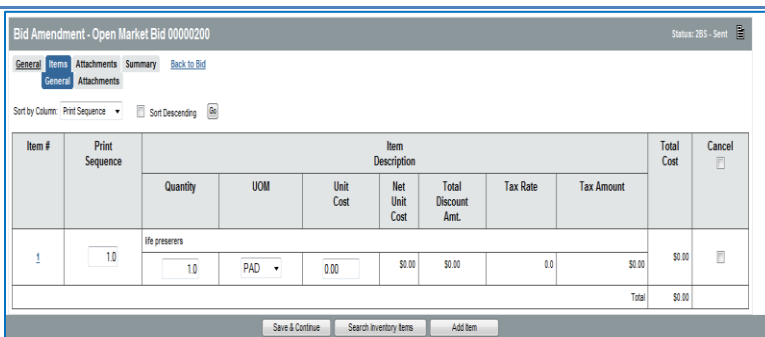
##### Step 33: Bid Amendment Items tab

On the Bid Amendments screen click the **Items** tab.



##### Step 34: About the Items Tab

On the Items tab, you can amend the print sequence, quantity, unit of measure (UOM), unit cost, or cancel an item(s).



## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

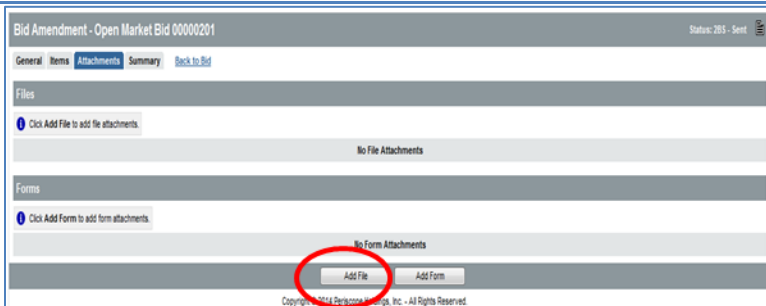
##### Step 35: Bid Amendment Attachments

On the Bid Amendments screen click the **Attachments** tab.



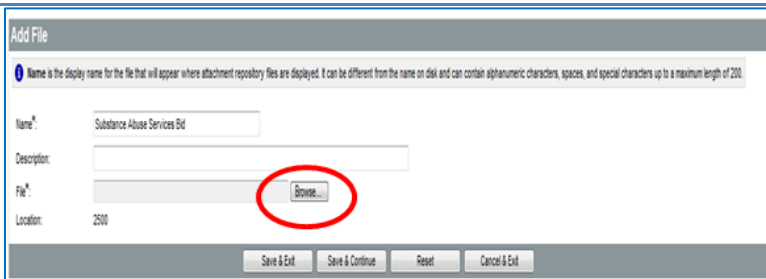
##### Step 36: Adding a File

Click the **Add File** button.



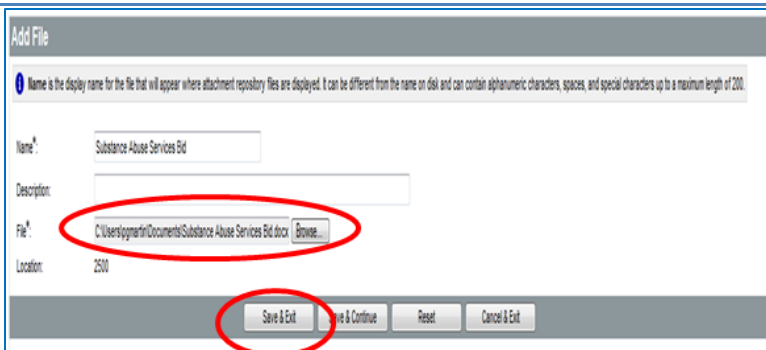
##### Step 37: File Fields

1. Enter a **Name** and **Description** for the attachment.
2. Click the **Browse** button to search for the completed Bid solicitation attachment.



##### Step 38: Saving the Attachment

1. Attach the file containing the finalized complete Bid solicitation information.
2. Click the **Save & Exit** button.





## Job Aid:

### How to Create a WTO Intent to Post

#### Screenshot

#### Directions

##### Step 39: Viewing Bid Attachment

1. The Bid Amendment screen displays the addition of the complete Bid solicitation attachment.
2. Repeat Steps 34-37 to attach the list of questions required from the vendor as part of the Bid.

##### Step 40: Summary Tab

1. Click the **Summary** tab to review the amended Bid information, including the addition of the new attachment containing the completed final Bid information
2. Click the **Apply Bid Amendment** button.

This will notify any vendor listed on the Bid of the amendment as well as post it on COMMBUYS for all vendors to search and quote against.

##### Step 41: Creating a Bid Amendment

The Summary screen displays the Bid amendment(s) and the Bid status remains at "Sent".

Bid Amendment - Open Market Bid 0000201 Status: 285 - Sent

General Items Attachments(1) Summary Back to Bid

Files

Name	Description	Show Vendor	Attached By	Attached Date	Delete
Substance Abuse Services Bid		<input checked="" type="checkbox"/>	Paul Martin	07/01/2014	

Forms

Click Add Form to add form attachments.

No Form Attachments

Save & Continue Add File Add Form

Bid Amendment - Open Market Bid 0000201 Status: 285 - Sent

General Items Attachments(1) Summary Back to Bid

Comment for the whole bid amendment:

Header/Item Changes

There are no recorded header/item changes.

Attachment File Changes

Modified Field	Item #	File	Description	User Updated	Date Updated	Show to Vendor
File #	Header	Substance Abuse Services Bid	File 'Substance Abuse Services Bid' added	Paul Martin	07/01/2014 11:28:52 AM	<input checked="" type="checkbox"/>

Comment:

After you click 'Apply Bid Amendment', all the changes will be updated in the real document.

Save & Continue **Apply Bid Amendment** Delete Bid Amendment

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments(1) Q & A Reminders Summary

Header Information

Bid Number: 00000200 Description: Minor Status:

Purchaser: Paul Martin

Organization: Operational Services Division

Fiscal Year: 14 Department:

Show On Web: Yes Allow Electronic Quote:

Bid Opening Date: 08/21/2014 10:07:00 AM Available Date:

Purge Date:

Bid Type: Open Bid Informal Bid:

Control Code:

Alternate ID: Estimated Cost:

Blanket/Contract Begin Date: Purchase Method:

Info Contact: Contact Paul Martin at (617)555-5555 Blanket/Contract End Date:

U N S P S C Code Certified Required: No Bulletin Desc:

Subcontractor Info: Quote Notification:

Date Last Updated: 08/14/2014 10:20:46 AM User last Updated:

Ship-to Address: One Ashburton Place, Room 1017 Bill-to Address:

US

Solicitation Enabled: No

Invoice Method: Three Way Match

Bidders:

Vendor Id	Vendor Name	Preferred Delivery Method	Notifications	Responded
00000005	Bane Supply	Email		No
00000009	Thiro Test	Email		No
00000010	Newpro	Email		No
00000015	XYZ Inc	Email		No
00000016	Kramerica Industries	Email		No

Amendments:

Amendment #	Amendment Date	Amendment Note
1	08/14/2014 10:20:46 AM	Item 1.1. UOM changed from "EA" to "PAD".

Attachments

Files:



## **Job Aid:**

### How to Create a WTO Intent to Post

#### APPENDIX 1

### **World Trade Organization (WTO) Intent to Post Notice**

**Instructions:** To create a WTO posting, Departments must create a Bid record with the full bid title in the Description field. The Description field cannot be amended once the Bid is posted, so the Description field should not contain the words “announcement only.” An attachment with the file name “IntentToPost” and the following content (with appropriate customization) must be attached to the Bid.

This is an announcement only. [Department Name] of the Commonwealth of Massachusetts intends to post a Bid for [scope description] and to require online Quote submission via COMMBUYS. Please do not contact the Purchaser with questions about the anticipated Bid. Bidders are solely responsible to monitor this site for amendments to this announcement, if any, and for the complete Bid posting, if any. Bidders may monitor the site through publicly accessible search and browse tools, or through COMMBUYS email notification and record tracking tools by ensuring the commodity codes associated with this record are included in the commodity codes section of their COMMBUYS profile. Bidders may elect to subscribe to COMMBUYS immediately or wait until they have reviewed the complete Bid posting including the RFR and its amendments, if any. Bidders who elect to establish a COMMBUYS account must select the Register [link](#) on [www.commbuys.com](http://www.commbuys.com) and complete the online subscription process.